New Year Rollover and Student Locator

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EDUSTRUCTURES

Contents

1. Overview

The first-generation Student Locator system is designed to work with student data from a single school year. More precisely, all students that are processed as part of batch resolution or event-driven transactions are considered to be from the same school year, as defined in the Settings dialog box of the Student Locator Console. One consequence of this limitation is that the system cannot process current-year students and future-year students concurrently. Students entering the district next year cannot receive a State ID through the Student Locator system until a manual New Year Rollover procedure has taken place.

This document describes New Year Rollover with regard to Student Locator and offers instructions for common student information systems like SASI™. Administrators should be aware that New Year Rollover impacts all SIF Agent software and applications differently and is not a process guided by industry standards. Each application may have its own unique requirements and procedures to promote students and prepare data for the next school year. If your SIF Infrastructure is being used for general application interoperability in addition to student ID management, please consult the documentation of the other participating applications when planning New Year Rollover procedures.

About This Document

The information herein applies to the following software products:

- Edustructures Student Locator Agent 1.x

- Edustructures SIFWorks® Enterprise ZIS 1.5.1 and later

SIS systems and SIF Agents covered:

- SASI™ student information system 6.0 and later with the Edustructures SIF Agent for SASI™ 1.5.2 and later

- PowerSchool 4.2.1 or later (including PowerSchool 5) with PowerSchool SIF Agent 1.5 or later

- Rediker Administrators Plus 4.5 with RedikerSIS Agent

- InfiniteCampus 2007.1 with the InfiniteCampus SIF Agent

State-Specific Information: Readers will generally receive many of the above products in conjunction with a statewide student ID management project or Schools Interoperability Framework (SIF®) initiative. Some of the information in this guide may differ for your state or school district. Please consult state-specific adjunct documentation, if available.

SIS-Specific Information: Although this guide is intended for users of the student information systems (SIS) listed above, the general description of New Year Rollover, as it relates to Student Locator, applies to all student information systems. In this guide, each SIS is covered by its own subsection within Chapter 2.

This document assumes a working understanding of Student Locator, the Schools Interoperability Framework, and the software components listed above.

About New Year Rollover

New Year Rollover (NYR) is the term given to a broad set of tasks required to prepare SIS data for the next school year. This includes enrolling students that are entering the district next year, graduating and promoting students, clearing account balances, etc. Most K-12 applications have a New Year Rollover procedure.

For the purposes of this document, we divide NYR into two phases:

1. **Pre-Rollover**. In this phase, which begins as early as January of the current school year, the district begins to build next year's student roster by pre-enrolling students such as incoming kindergartners.

2. **Final Rollover**. In this phase, which begins after the current school year has ended and is completed before the new school year begins, the district finalizes the New Year Rollover process for its student information system and other K-12 applications.

Currently, the Student Locator system supports Final Rollover only. Pre-enrolled students do not participate in Student Locator transactions until after the Final Rollover process has completed.

SIF and New Year Rollover

Because it is so varied from vendor to vendor, the Schools Interoperability Framework standard does not address the concept of New Year Rollover. In the absence of an industry-standard procedure, each SIF Agent deals with rollover in its own way to satisfy the unique requirements of the application.

The generally accepted process for New Year Rollover in a SIF Zone is:

1. Consumer SIF Agents are optionally turned off at the end of the school year

2. The student information system (SIS) is rolled over. Some SIS systems report SIF Events for the changes that take place during New Year Rollover, while others do not. Edustructures prefers the latter approach and strongly recommends disabling event reporting during the New Year Rollover procedures. (Alternatively, you can deny the SIS permissions to report SIF Events by adjusting the Access Control Policy at the zone integration server.)

3. Consumer SIF Agents are started again and, if necessary, configured to expect data from the current school year

4. Each consumer SIF Agent is "resynchronized" with the zone. For the Student Locator, this means running a batch resolution.

2. New Year Rollover in the Student Information System

This section sets forth the basic SIF-related New Year Rollover instructions for each listed Student Information System (SIS). Please consult your vendor's documentation for more general information about the New Year Rollover process.

SASI and the SIF Agent New Year Rollover Wizard

The SASI SIF Agent requires that a New Year Rollover procedure be performed when transitioning from one school year to the next. This procedure is automated by the New Year Rollover Wizard, found on the **Tools > Wizards** menu of the agent's Console. Follow these steps at the end of a school year.

☞ **WARNING:** Do NOT begin the SIF NYR process unless the SIF zone is ready to stop publishing current year data. Once the SIF NYR Wizard is started, data can no longer be published from the current SASI school year. The district can be at any point in the SASI New Year Rollover process (Non Student, Student, Graduate/Archive).
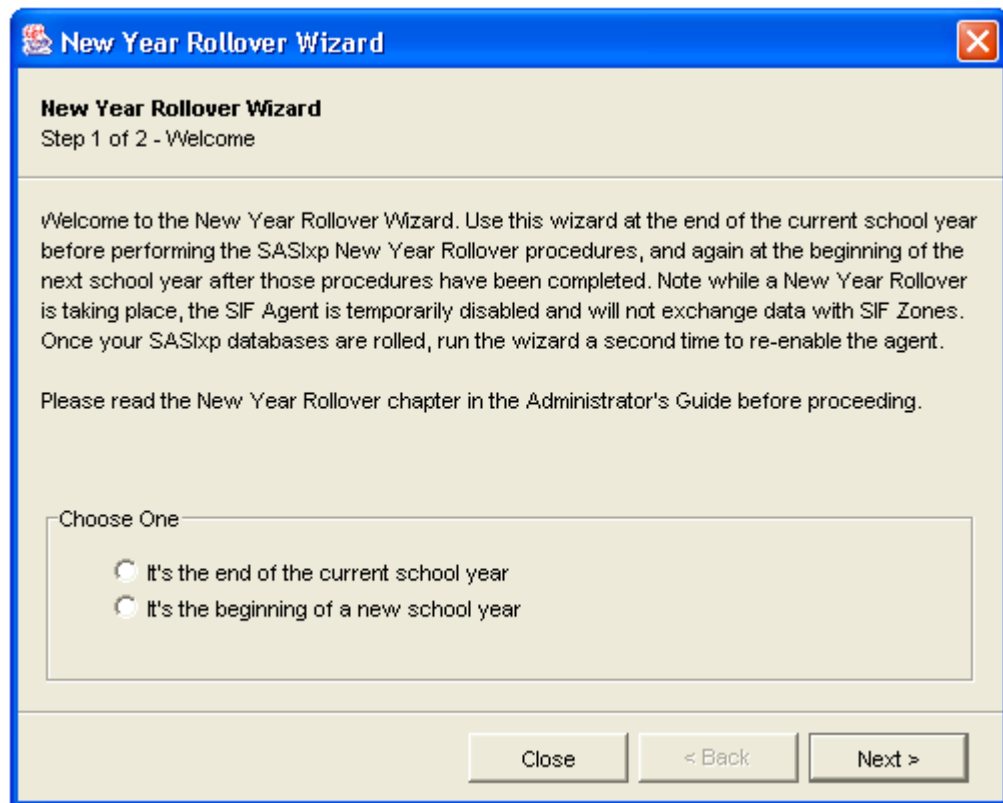
A. Run the SASI agent's New Year Rollover Wizard as described in this section "Run the New Year Rollover Wizard and select 'It's the end of the current school year'"

B. Proceed with any outstanding SASI application's New Year Rollover procedures

Once you have completed the SASI application's Final Rollover and are ready to use next year's database, follow these steps:

C. Run the SASI Agent's New Year Rollover Wizard described in this section "Run the New Year Rollover Wizard and select 'It's the beginning of a new school year'"

D. Resynchronize any SIF Agents as necessary

☞ **IMPORTANT:** Once the SASI Agent's New Year Rollover Wizard has been used to advance to the next school year, the process cannot be reversed. For example, you cannot publish data from the 2005-2006 school year, rollover to the 2006-2007 school year, and then switch back to the 2005-2006 school year.

The agent's New Year Rollover Wizard can be used in conjunction with the SASI application's New Year Rollover procedures.

Step A. Run the Wizard and Select "It's the end of the current school year"

1. Open the SASI Agent Console.

2. Choose **Tools > Wizards > New Year Rollover Wizard…** from the menu.

3. Choose "It's the end of the current school year" and click the Next button.

4. On the next page, click the Finish button to proceed.

On the main window, all zones will have a warning icon and are in a disabled state. New students added to the SASI application will no longer result in event-driven Student Locator transactions.

After you click **Finish**, the wizard performs this SIF maintenance task:

• Disables the agent's connectivity to each SIF Zone.

   This is a precautionary measure to prevent the agent from sending SIF Event messages and responding to SIF Requests while a New Year Rollover procedure is in progress.

### Step B. Perform SASI New Year Rollover Procedures

In Step B, you should perform any remaining SASI New Year Rollover procedures. For many districts this is an iterative process that may take some time to complete. When

you've completely finished with the SASI Final Rollover and are ready to publish next year's data to SIF, proceed with Step C.

Step C. Run the Wizard and Select "It's the beginning of the new school year"

1. Open the SASI Agent Console.

2. Choose **Tools > Wizards > New Year Rollover Wizard…** from the menu.

3. Choose "It's the beginning of a new school year".

4. Choose the appropriate school year from the combo-box:

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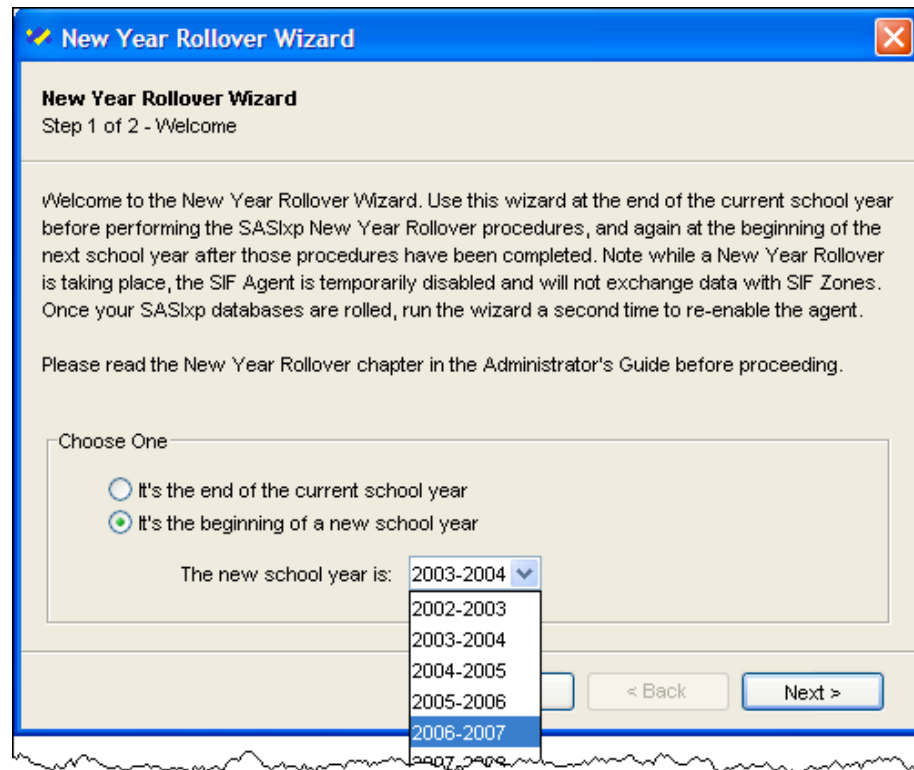
5. Click **Next** to proceed to page 2 of the wizard.

6. Verify the targeted schools are marked, and then click **Next** to proceed to page 3 of the wizard.

You may chose to run a subset of schools if you have a moderate or large sized district. You may select the target schools, run the process, and verify success. Then rerun Step C with another set of schools.

7. Clear the "Report SIF Events" checkbox (which is marked by default). **It is important that events are not reported during this step.** The remaining controls

on the page will be disabled and grayed out as they no longer apply, so don't worry about the default values shown.

8. Click **Next** to proceed to the final page.

9. Click **Finish** to make the changes.

When this option is selected, the wizard performs these SIF maintenance tasks:

- Reconciles identifiers in the SIF Object IDs database with new student identifiers

  During a SASI New Year Rollover procedure, the internal "StuLink" identifiers of each student are changed. The agent uses these identifiers to associate SASI records with SIF Data Objects. During this step, the wizard reconciles student identifiers by updating the "StuLink" values in the agent's database to match those in the SASI database.

- Clears the SASI Event Transaction Log

  During the New Year Rollover procedure, the SASI Event Transaction Log file (AEVT) may be filled with records that should be deleted. The agent deletes all entries from this file before proceeding to the next step.

NOTE: Edustructures recommends a Reorg be performed on the AEVT file after this procedure has completed, as it may have grown very large during New Year Rollover processing. Regular reorganization of the AEVT file will improve overall performance of the SIF Agent.

- Increments the school year for each SIF Zone

  When a SIF Zone is added to the agent, the administrator specifies the school number and school year. During this step, the school year is automatically incremented.

- Re-enables the agent's connectivity to each SIF Zone

PowerSchool SIF Agent and New Year Rollover

To be added soon. If you have any questions, please contact your state office support staff.

Infinite Campus SIF Agent and New Year Rollover

To be added soon. If you have any questions, please contact your state office support staff.

RedikerSIS SIF Agent and New Year Rollover

To be added soon. If you have any questions, please contact your state office support staff.

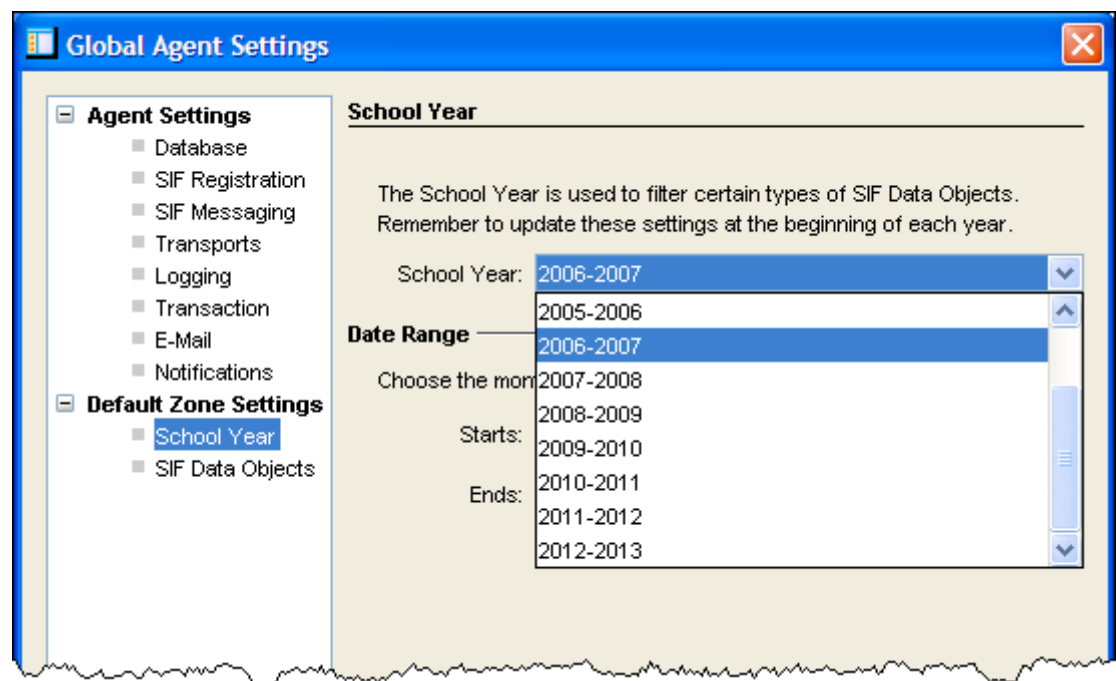# 3. New Year Rollover with the Student Locator Agent

These instructions apply to Final Rollover only (for all SIS products) and are suitable for general year-to-year operation of the system. If you need to obtain State IDs now for pre-enrolled students that will not become active until next year, follow the steps listed in the section "Manually Obtaining State IDs for Pre-Enrolled Students" on page 12.

Step A. Student Information System Rollover

1. Follow the steps for your student information system (SIS), as described in Chapter 2 of this document. If your SIS is not listed in Chapter 2, contact your state office or Edustructures for updated information.

2. Once New Year Rollover procedures are finalized for your SIS system, and after that product's SIF Agent is configured to publish next year's data to the district's zones, proceed with Step B.

Step B. Change School Year in Student Locator

1. Open the Student Locator Console.

2. Choose **File > Agent Settings**.

3. Highlight the **Default Zone Settings > School Year** node in the tree.

4. Choose the correct school year from the combo-box (illustrated above).

5. Close the Settings dialog box.

6. Restart the Student Locator agent for the changes to take affect.

The selected school year is now the active year. All transactions performed by Student Locator will be for this school year. New Year Rollover processing is considered complete. You can perform a Batch Resolution to obtain state IDs for all students that do not currently have one.

Manually Obtaining State IDs for Pre-Enrolled Students

The instructions provided in the previous section apply to Final Rollover only and are NOT suitable for general year-to-year operation of the system. If you need to obtain State IDs for pre-enrolled students that will not become active until next year, you must do so with a manual non-SIF process. Consult the documentation for your state's ID management system or information provided by your state office of education for specific details on manually obtaining and importing State IDs.